

SOLICITATION NUMBER: TIRNO-04-R-00017

AMENDMENT NUMBER: 0001

1. **Delete** in its entirety the cover letter to all Prospective Offerors, which was dated June 23, 2004. It will not be part of the contract.

2. **All references** within the RFP relevant to Procurement Policy and Procedures (P&P) 39.1(b) is hereby changed to reflect the following Internal Revenue Service Acquisition Procedures (IRSAP) clauses.

The P&P 39.1(b) is an internal document to the IRS and implements the IRS requirement that all software development contractors possess a capability rating of at least CMMI Level 2. More importantly, P&P 39.1(b) sets forth the applicable clauses that are to be included in all solicitation and contract documents. Please note that the required clauses are in the RFP at the following sections:

SECTION H.39 - IRSAP 1052.239-9005 SOFTWARE DEVELOPMENT PREREQUISITE (APR 2002)

SECTION H.40 - IRSAP 1052.239-9006 SOFTWARE DEVELOPMENT PREREQUISITE (SUPPLEMENT) (APR 2002)

SECTION L.14.4.4 - INSTRUCTIONS TO OFFERORS - SOFTWARE DEVELOPMENT PREREQUISITE (APR 2002)

3. **Under SECTION B.7 – CONTRACT MINIMUMS AND MAXIMUMS**, Change subparagraph (b) to read:

(b) Maximums – It is anticipated that 65% of the number of task orders issued under the TIPSS-3 Program will be awarded to Full and Open Competition contractors, and 35% of the number of task orders issued will be awarded to Partial Small Business Set-Aside Competition contractors.

4. **Under SECTION C.4.6 - ACCESS TO GOVERNMENT PROPERTY AND FACILITIES**, Make the following changes:

a. Change the last sentence in the second paragraph to read:

(See Sections H.31 through H.37, and H.41 for clauses pertaining to security screening, identification/badging, disclosure of information, and systems access requirements).

b. Change the second and third sentences in the fourth paragraph to read:

Therefore, the position of risk for this contract would be moderate and require a National Agency Check with Law and Credit (NACLC). The NACLC will include, but not be limited to: favorable review of the SF-85P, law enforcement checks, FBI fingerprint and name checks, and federal tax record checks.

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c. Delete the fifth paragraph in its entirety and replace to read:

In order to obtain required background investigations, the Contractor shall require their Corporate-level Key Management Personnel to complete and submit background investigation information to the Lead COTR for processing through the IRS National Background Investigations Center (NBIC). Corporate-level Key Management Personnel are required to submit investigation information within ten (10) calendar days after contract award as they will be active on the contract and task orders at all times. Instructions for completion and submission of this information shall be provided at the time of contract award by the Lead COTR.

d. Delete the sixth paragraph in its entirety and replace to read:

Contractor personnel at the task order level shall submit investigation information before they start work on a task order to the Task Order COTR. If an individual is hired by a Contractor after previously working at the IRS for another Contractor, the COTR is required to verify that a previous investigation was actually completed, that it is current, and that the person remains acceptable. The NBIC will make the determination whether to perform an update, a new complete investigation or to accept the current investigation results. The Contractor will be notified accordingly.

e. Delete the eighth paragraph in its entirety and replace to read:

Contractor employees will be required to be fingerprinted and arrangements for fingerprinting can be made through the Lead COTR for Corporate-level Key Management Personnel (to include replacement personnel) and the COTR for task order personnel (to include additional or replacement personnel), when the employee has accessibility to a local IRS office. However, if the employee cannot come to an IRS office to be fingerprinted, employees may need to go to a local law enforcement agency for fingerprinting. Fingerprints must be completed on the form FD-258 furnished by the IRS. Any cost for fingerprinting outside of the IRS shall be borne by the Contractor.

f. Change the first sentence in the ninth paragraph to read:

If the Lead COTR or COTR receives a denial of access from NBIC after processing of the above forms, or if the Lead COTR finds a prospective employee to be unsuitable or unfit for his assigned duties, the Contractor shall be advised immediately in writing.

g. Delete the eleventh paragraph in its entirety and replace to read:

The Contractor shall absorb the cost of the background investigations. The Contractor shall provide funds to the IRS for the cost of the background investigations. The average minimum cost per investigation is \$275.00 or more. Upon initial award of a contract, the Contractor shall submit the full amount of funds sufficient to cover the cost of the investigations for the Primary Corporate-level Key Management Personnel. Instructions for submitting payment will be provided at the time of contract award.

Funds for the investigations of additional or replacement personnel shall be submitted at the time of task order award or as the need arises. However, the Contractor should attempt to consolidate funds into a single amount as often as possible. No fee shall be associated with any investigation costs. Costs for the investigations are not allocable under this contract; therefore, the Contractor will not be reimbursed for costs associated with background investigations. The IRS considers this an acceptable "cost" of doing business for an awarded Contractor.

h. Delete paragraph twelve in its entirety and replace to read:

Upon contract award, instructions for completion/submission of all required forms for security background investigations for the Corporate-level Key Management Personnel will be made available to successful offerors by the Lead COTR.

5. Under SECTION C.4.13 - COMPLIANCE TO CAPABILITY MATURITY MODEL (CMMIsm) STANDARDS, Delete in its entirety and revise to read as follows:

COMPLIANCE TO CAPABILITY MATURITY MODEL INTERGRATION (CMMI[®]) STANDARD

It is mandatory that all Contractors who are awarded task orders for any activity related to software development for the IRS comply with the IRS policy for CMMI[®] compliance. All tasks that fall within the software development life cycle shall at a minimum comply with Level 2 of the staged representation of the CMMI[®] for Software Engineering (CMMI-SW). There are no exceptions to this IRS policy. This policy, as relates to IRS, is contained in Section J, Attachment J.8, Internal Revenue Service Capability Maturity Model Integration (CMMI[®]) Requirements and Instructions.

Contractors who identify specific Subcontractor(s) as integral to the performance of software development work, shall obtain evidence that the Subcontractor(s) identified are CMMI-SW Level 2 compliant, or alternatively, shall arrange for any software development work done by the Subcontractor to be performed within the Contractor's CMMI-SW Level 2 processes. It shall be the responsibility of the Contractor to ensure that its Subcontractors perform software development work within a CMMI-SW Level 2 compliant process. Contractors developing software for the IRS shall maintain Level 2 or higher in the staged representation of the CMMI-SW in order to continue to receive software tasking.

The CMM Review Team will monitor Contractor process maturity before:

- (a) Using standard IRS Process Appraisal Review Methodology (PARM) processes, including execution of Standard CMMI Appraisal Method for Process Improvement (SCAMPISM), as needed,
- (b) Performing annual cycles of review for CMMI-SW, and
- (c) Considering all types of appraisal data and process improvement infrastructure data as standardized by the IRS PARM process.

Contractors that receive awards in any task area as a large business (competitive process) shall provide evidence of CMMI-SW Level 2 rating by November 29, 2004. Small Business, Hub-Zone and Small Disadvantaged Businesses and Section 8(a) firms shall provide evidence of their CMMI Level 2 rating prior to receiving any work for software development.

6. Under SECTION C.5.1 FUNCTIONAL REQUIREMENTS FOR KEY PERSONNEL IN THE CORPORATE AREA, Change the following title to read:

FUNCTIONAL REQUIREMENTS FOR KEY MANAGEMENT PERSONNEL IN THE CORPORATE AREA

7. Under SECTION C.6 – PRINCIPAL TASK AREAS, Add a new paragraph to read:

Large Business Offerors and Small Business Offerors who elect to compete under the Full and Open Competition **must** submit a proposal for the Information Systems Services (ISS) Principal Task Area (See C.6.1) and **may** submit a proposal for any or all of the two (2) other Principal Task Areas (See C.6.2 and C.6.3). Large Business Offerors and Small Business Offerors in the full and open competition who **do not propose in the ISS Task Area will be determined to be non-responsive**. Small Business Offerors who submit a proposal under the Partial Small Business Set-Aside Competition shall submit a proposal for any or all of the three (3) Principal Task Areas (See C.6.1, C.6.2, C.6.3), L.13 and L.15).

8. Under SECTION C.6.1.1 – SCOPE OF WORK FOR THE INFORMATION SYSTEM SERVICES (ISS) PRINCIPAL TASK AREA, Delete “Software Security Certification and Accreditation” bullet in its entirety.

9. Under SECTION C.6.2.1 - SCOPE OF WORK FOR SYSTEM SECURITY SERVICES (SSS) PRINCIPLE TASK AREA, Make the following change:

Delete the blank line **between** “Quantitative Risk Analysis of Large Sensitive Systems” **and** “Security Certification and Accreditation”.

10. Under SECTION C.6.3.1 - SCOPE OF WORK FOR STRATEGIC BUSINESS SERVICES (SBS) PRINCIPLE TASK AREA, Make the following changes:

a. Change the title to read as follows:

SCOPE OF WORK FOR STRATEGIC BUSINESS SERVICES (SBS) PRINCIPLE TASK AREA

b. Delete the blank line between “Quality Management;” and “Risk and Threat Analysis”.

11. Under SECTION C.7.2 - LABOR CATEGORY DESCRIPTIONS FOR THE THREE PRINCIPLE TASK AREAS (T&M), Make the following changes:

- a. Delete the second, third and fourth sentences in the first paragraph.
- b. Delete the second paragraph and replace to read:

The T&M labor categories below are not limited to any one principle task area. A short description for each category follows the list below: (See Section B for an entire list of T&M labor categories to be priced.)

12. Under SECTION F.8.2 – TIPSS-3 TERM/TIME & MATERIAL (T&M) T.O. STATUS REPORTS, Make the following changes:

- a. Change the heading to read: **“TIPSS-3 TERM T.O. STATUS REPORTS”**
- b. Change the first sentence in subparagraph (b) to read:
 - (b) The Contractor shall submit Term T.O. Status Reports in the formats at Section J.14, Figure J.14.4, TIPSS-3 TERM T.O. STATUS REPORT FOR T.O. UNDER \$500K and Figure J.14.5, *TIPSS-3 TERM T.O. STATUS REPORT FOR T.O. OVER \$500K.*
- c. Change subparagraph (c)(4) to read:
 - (c)(4) The plan to expend funds *exceeds the funds actually negotiated or exceeds the current ceiling of the order.*

13. Under SECTION H.1 – ORDERING OF SERVICES, Revise to read as follows:

(g) Funds for services to be provided under this contract will be obligated by each individual task order. Due to the anticipated volume of orders under this contract, the ordering office may exercise the right to negotiate additional discounts on the proposed contract Section B, Time and Material (T&M) hourly labor rates.

14. Under SECTION H.5 – FEE ON TASK ORDERS, Change the last sentence to read as follows:

The same ratio of fee awarded in the initial contract award will be used in any task orders issued *unless a lower fee is negotiated.*

15. Under SECTION H.20 – SUBSTITUTION OF KEY MANAGEMENT PERSONNEL and SECTION H.22 – SUBSTITUTION OF KEY TASK ORDER PERSONNEL, Add the following new paragraph after the heading of each section:

The substitution of key management personnel will be applicable to the contract and may be applicable to certain task orders issued under this contract.

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The “Substitution of Key Management Personnel” clause will be added to all task orders requiring identification of Key Management Personnel.

16. Under SECTION H.39 – IRSAP 1052.239-9005 SOFTWARE DEVELOPMENT PREREQUISITE (APR 2002), Delete entire clause and replace to read:

Definitions: Delete Items 1 through 18 and replace with the following 1 through 15:

1. *“Appraisal Requirements for Capability Maturity Model Integration” (ARC)* means the Class A Appraisal Requirements for the Standard CMMI[®] Appraisal Method for Process Improvement (SCAMPISM). This appraisal method is used with the CMMI[®] model. Class A appraisals provide a CMMI rating and include all ARC requirements.
2. *“Capability Maturity Model[®]” (CMM[®])* means a framework that describes the key elements of an effective software process.
3. *“Capability Maturity Model Integration (CMMI[®])”* means an integrated CMM model that encompasses the key elements for enterprise-wide process improvement. The current CMMI includes the disciplines of Software Engineering (SW), Systems Engineering (SE), Integrated Product & Process Development (IPPD) and Supplier Sourcing (SS).
4. *“CMMI[®] for Software Engineering (CMMI-SW)”* means at a minimum the version of the CMMI model that contains only the software engineering discipline.
5. *“On-site”* means the SEI appraisal phase in which an appraisal team conducts extensive interviews at the organization’s software development facility or the location of the organization’s software development projects. Some portions of the on-site may include teleconferencing or telephone interviews of personnel at remote locations.
6. *“Post-award Current Software Capability Rating”* means the CMMI-SW rating or maturity level determined by an appraisal for which the commencement date of the appraisal on-site occurred within the 18 months immediately preceding the due date of the initial PARM submittal for a given year.
7. *“Pre-award Current Software Capability Rating”* means the CMMI-SW rating or maturity level determined by an appraisal for which the commencement date of the appraisal on-site occurred within the 12 months immediately preceding the proposal due date.

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8. *“Process Analysis Review Methodology (PARM)”* means the methodology employed by the Internal Revenue Service to review, monitor, and verify Contractor CMMI®-SW maturity levels during the period of performance of the contract.
9. *“SCAMPI Lead Appraiser”* means an individual authorized by SEI as a SCAMPI Lead Appraiser, substantiated by an SEI SCAMPI Lead Appraiser number.
10. *“Small business”* means a concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in which it is bidding on government contracts, and qualified as a small business under the criteria and size standards in 13 CFR Part 121. For software development, the size standard to be eligible as a small business concern is less than \$21 million in average annual receipts for the previous three fiscal years.
11. *“Software Capability Rating”* means the CMMI-SW rating or maturity level achieved as the result of a Standard CMMI Appraisal Method for Process Improvement (SCAMPISM), conducted according to the SEI Appraisal Requirements for CMMI (ARC) Class A appraisal method, latest version.
12. *“Software development”* means any activity, in whole or in part, that is part of a software life cycle.
13. *“Software life cycle”* means the period of time that begins when a software product is conceived and ends when the software is no longer available for use. The software life cycle typically includes the following phases: concept, requirements, design, implementation, test, installation and checkout, operation and maintenance, and retirement.
14. *“Standard CMMI Appraisal Method for Process Improvement” (SCAMPISM)* means an SEI-approved appraisal method based on the full set of Class A requirements in the ARC, latest version. A SCAMPI is conducted by an appraisal team and led by an SEI-authorized SCAMPI Lead AppraiserSM. It includes the requirements for planning, conducting, and completing the CMMI appraisal. A SCAMPI provides an organization with either CMMI “Process Area Capability Ratings” for the CMMI Continuous Model or a “Capability Maturity Level Rating” for the CMMI Staged Model.
15. *“Verify”* means an evaluation of evidence provided by the CMMI-SW rating, which is conducted by the IRS in accordance with the Process Appraisal Review Methodology (PARM) after award of the contract.

b. Change first sentence to read “....rating of CMMI-SW Level 2 or higher as described by the SEI.”

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c. Delete contents and replace with the following:

The CMMI-SW software capability rating shall be current and shall be substantiated by a Standard CMMI Appraisal Method for Process Improvement (SCAMPISM) (ARC Class A) as specified in the solicitation.

d. Delete contents and replace with the following:

As a condition of award, the IRS reserves the right to review and confirm the CMMI-SW maturity levels of offerors. As a further condition of award, the IRS reserves the right to conduct a SCAMPISM) (ARC Class A).

e. Delete contents and replace with the following:

After award and throughout the period of performance, the IRS reserves the right to review, monitor, and verify Contractor CMMI-SW maturity levels in accordance with the Process Appraisal Review Methodology (PARM). The IRS further reserves the right to conduct an independent appraisal of the Contractor, including a SCAMPISM.

f. Change "CMM" to "CMMI-SW."

g. Delete remainder of Clause H.39 after Item g.

17. Under SECTION H.40 - IRSAP 1052.239-9006 SOFTWARE DEVELOPMENT PREREQUISITE SUPPLEMENT (APR 2002), Delete contents of H.40 in its entirety and replace with the following content:

It is understood that the subcontractor does not have a Level 2 or higher software capability rating of the Capability Maturity Model Integration[®] for Software Engineering (CMMI-SW). The IRS has approved the subcontractor's participation in the software development project, (*C. O. will insert name of IRS software development project at the time of T.O. award*), using the prime contractor's CMMI-SW Level 2 or higher processes. The prime contractor is responsible for the planning, management, and performance of the software development project according to its documented processes, utilizing subcontractor resources as mutually agreed between the prime contractor and subcontractor. The subcontractor, in performing its agreed task assignments for the software development project, shall comply with the prime contractor's direction.

18. Under SECTION I.3.1 - 52.209-1 QUALIFICATION REQUIREMENTS (FEB 1995), Delete the sentence that begins "For Capability Maturity..." and delete the name and address lines.

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19. Under **SECTION I.3.11 – 52.219-18 NOTIFICATION OF COMPETITION LIMITED TO ELIGIBLE 8(A) CONCERNS (JUNE 2003) – ALTERNATE III (DEVIATION) (MAY 1998) (APPLIES TO 8(A) COMPETITIVE SET-ASIDES ONLY)**, Revise the sentence under ALTERNATE III (DEVIATION) to read as follows:

Substitute the following for the paragraph (c) in 52.219-18:

20. Under **SECTION J.1 – GLOSSARY**, Should any definition herein conflict with the FAR or other applicable Federal law or regulation, the FAR or applicable Federal law or regulation shall take precedence. Add the following glossary terms:

a. Insert between the definitions for “Authorization” and “Classified Information” the following:

Capability Maturity Model Integration (CMMI®) - An integrated CMM model that encompasses the key elements for enterprise-wide process improvement. The current CMMI includes the disciplines of Software Engineering (SW), Systems Engineering (SE), Integrated Product & Process Development (IPPD) and Supplier Sourcing (SS).

b. Insert between the definitions for “Classified Information” and “Compromise” the following:

CMMI® for Software Engineering (CMMI-SW) - At a minimum the version of the CMMI model that contains only the software engineering discipline.

c. Insert between the definitions for “Site” and “Systems Software” the following:

Software Capability Rating - The CMMI-SW rating or maturity level achieved as the result of a Standard CMMI Appraisal Method for Process Improvement (SCAMPISM), conducted according to the SEI Appraisal Requirements for CMMI (ARC) Class A appraisal method, latest version.

d. Insert after the definition for “Unauthorized Disclosure” the following definition:

Verify -An evaluation of evidence provided by the CMMI-SW rating, which is conducted by the IRS in accordance with the Process Appraisal Review Methodology (PARM) after award of the contract.

21. Under **SECTION J.6 – LABOR CATEGORIES AND HOURS**, Change the total for Subject Matter Experts” from “28,112” to read: “8,112”.

22. Under **SECTION J.7 - IRSAP 1052.239-9004 – SOFTWARE DEVELOPMENT PREREQUISITE (APR 2002)**: Is hereby deleted in its entirety and is replaced with:

IRSAP 1052.239-9005 – SOFTWARE DEVELOPMENT PREREQUISITE (APR 2002)

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(a) Definitions: As used in this clause,

1. “Capability Maturity Model Integration (CMMI®)” means an integrated CMM Model that encompasses the key elements for enterprise-wide process improvement. The current CMMI includes the disciplines of Software Engineering (SW), Systems Engineering (SE), Integrated Product & Process Development (IPPD) and Supplier Sourcing (SS).

2. “CMMI® for Software Engineering (CMMI-SW)” means at a minimum the version of the CMMI model that contains only the software engineering discipline.

3. “Software Capability Rating” means the CMMI-SW rating or maturity level achieved as the result of a Standard CMMI Appraisal Method for Process Improvement (SCAMPISM), conducted according to the SEI Appraisal Requirements for CMMI (ARC) Class A appraisal method, latest version.

4. “Process Analysis Review Methodology (PARM)” means the methodology employed by the Internal Revenue Service to review, monitor, and verify Contractor CMMI-SW maturity levels during the period of performance of the contract.

5. “Verify” means an evaluation of evidence provided by the CMMI-SW rating, which is conducted by the IRS in accordance with the Process Analysis Review Methodology (PARM) after award of the contract.

(b) Contractors performing software development for the IRS as required under this contract shall have, and maintain at all times during performance, a software capability rating of CMMI-SW Level 2 or higher as described by the SEI.

(c) Detailed information about the model may be obtained from the Software Engineering Institute, Carnegie Mellon University, and Pittsburgh, PA 15213-3890.

(d) As a condition of award, the IRS reserves the right to review and confirm the CMMI-SW maturity levels of offers. As a further condition of award, the IRS reserves the right to conduct a SCAMPISM (ARC Class A).

(e) After award and throughout the period of performance, the IRS reserves the right to review, monitor, and verify Contractor CMMI-SW maturity levels in accordance with the Process Appraisal Review Methodology (PARM). The IRS further reserves the right to conduct an independent appraisal of the Contractor, including a SCAMPISM.

(f) On an annual basis, the Contractor shall substantiate its current software capability rating by submitting documentation in accordance with the PARM. The IRS will perform a review annually in order to verify the Contractor’s compliance with its contractual “CMMI-SW” maturity requirements.

(g) The Contractor shall include the terms of this clause in all subcontracts under this contract.

23. Under SECTION J.8 IRS CAPABILITY MATURITY MODEL (CMMI®) REQUIREMENTS, revise the following subsections as follows:

a. J.8.1 - PRE-AWARD CMMI® VALIDATION, Delete in its entirety and replace to read:

The goal of the Capability Maturity Model Integration® (CMMI®) validation effort during this source selection is to validate that Contractors selected to perform IRS software development work are capable of practicing the Software Engineering Institute (SEIsm) CMMI Level 2 maturity.

The source selection practice as suggested by the SEI recommends that the procuring agency field a Standard CMMI Appraisal Method for Process Improvement^(sm) (SCAMPI^(sm)) team to determine prospective software development Contractors' CMMI® process maturity level. This is a very time-consuming, labor-intensive process and is not practical for multiple award acquisitions that are expected to consider many vendors. The objective of this approach, therefore, is to provide a means of validating Contractor process maturity within the time constraints of the acquisition.

Large Business Offerors and Small Business Offerors, who elect to compete under the full and open competition, shall provide evidence of process maturity in accordance with the IRS Policy and Procedure 39.1(B) Capability Maturity Model for software through the submission of SCAMPI^(sm) (ARC Class A) results.

b. J.8.2 - DATA SUBMISSION REQUIREMENTS, Delete in its entirety and replace to read:

Data submitted by Offerors may vary depending on whether the Offeror seeks award under the full and open competition or the partial small business set-aside competition.

Offerors proposing under the full and open competition shall submit data from at least one external SCAMPI^(sm) (ARC Class A), but no more than three, that demonstrates software development compliance with SEI's Staged CMMI-SW Version 1.1. The submission material shall be dated within 12 months from the first day of the on-site period to the proposal due date to include the following information:

- Names, titles, organizational affiliation, address, phone number, and credentials of the external evaluation team
- Detailed final findings report and briefing
- Organizational chart showing affiliation of evaluated organization and proposing organization and number and type of staff associated with each component represented by the organizational chart

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- Project profiles for each project evaluated providing details on the attributes of the projects: project description, application domain, software size, life cycle, project schedule, current phase of the project, and staffing profile
- On-site period dates of performance and interview schedule detailing names, roles, and organizational affiliations of individuals interviewed

Offerors proposing under the Partial Small Business Set-Aside (SBSA) have two (2) options:

(1) SBSA Offerors may validate their SEI CMMI-SW Level 2 status by providing the same CMMI information required for proposing under the full and open competition; or alternatively,

(2) SBSA Offerors may choose to defer validation of their SEI CMMI-SW Level 2 status until after contract award.

SBSA Offerors should carefully consider the advantages and disadvantages of their choice. A bidder that does not have current assessment data to submit may defer the expense of an assessment until after contract award. However, the IRS will not issue any software development tasks to any Contractor until the IRS CMM Review Team has validated that the Contractor's software engineering process maturity is CMMI-SW Level 2 or better. If the Contractor chooses to defer process maturity validation, the amount of time after contract award that the Contractor is ineligible to receive software development tasks may be substantial. It is also noteworthy that:

- SEI data shows that the number of organizations assessed at CMMI-SW Level 2 or better has significantly increased
- Under the current TIPSS contracts, IRS software development work constitutes over half the tasking

c. **J.8.3 - CMMI LEVEL 2 VALIDATION**, Delete "I" from "CMMI" in the first paragraph and revise the remainder of J.8.3 to read as the following:

Acceptance Criteria: The SCAMPI^(sm) (ARC Class A) information submitted is validated against established criteria and must clearly indicate that:

- the offeror is at a minimum, a CMMI-SW Level 2 organization
- the assessment was performed within 12 months from the first day of the on-site period to the proposal due date
- the assessment was performed on the proposing organization
- the assessment was performed in accordance with Assessment Requirements for CMMI (ARC) Class A Version V.1.1
 - examined at least 3 projects
 - covered, in the aggregate, at least 20% of the technical workforce proposed for software development.
- the assessment used SEI framework: CMMI-SW v 1.1 or later
- the assessment considered at least all process areas in CMMI-SW Level 2, including Configuration Management, Requirements Management, Project Planning, Project Monitoring and Control, Supplier Agreement Management, Measurement and Analysis,

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and Process and Product Quality Assurance (the Supplier Agreement Management process area may be outscoped if the proposing organization does not propose to use subcontractors for any portion of the software effort)

- all Level 2 process areas were evaluated as “fully satisfied”
- the assessment was performed by qualified external assessors; specifically:
 - all appraisal team members were SEI trained and certified in the Introduction to CMMI course and Intermediate Concepts of CMMI course.
 - at least one member of the appraisal team has completed and is licensed and certified by the SEI as a SCAMPI Lead Appraiser (certificates for appraisal team members are required including the SEI SCAMPI Lead Appraiser number)

d. **J.8-4 - POST-AWARD MONITORING**, Add “-SW” after “CMMI in the first sentence and delete “I” from “CMMI” in the second sentence of the first paragraph.

24. **Under SECTION - J.9.2 ENTERPRISE LIFE CYCLE (ELC)**, Change the first paragraph of the **second bullet** to read as “Compliance with the Software Engineering Institute’s Capability Maturity Model Integration for Software Engineering (CMMI-SW)”. Change the third paragraph of the **third bullet** in the last sentence, to add “on” between the words “determined “ and “an.”

25. **Under SECTION J.14 - REPORTS**, Change the following subsections to read as:

a. **FIGURE J.14.4**, Change the title to “TIPSS-3 TERM T.O. STATUS REPORT FOR T.O. under \$500K FOR THE PERIOD ...”

b. **FIGURES J.14.5, J.14.5 -1 through J.14.5-3**, Change the title to “TIPSS-3 TERM T.O. STATUS REPORT FOR T.O. OVER \$500K FOR THE PERIOD ...”

c. **FIGURE J.14.9**, Revise the title to read - “**TIPSS-3 QUARTERLY AGENCY/BUREAU REPORT**” and revise the first column title to read – “**Agency/Bureau Name**”.

26. **Under SECTION J.15.3 - CONTRACTOR SELECTION PROCEDURES**, Change “CMMI” to “CMMI-SW” in the fourth paragraph of the last sentence.

27. **Under SECTION K.4 - WOMEN-OWNED BUSINESS (OTHER THAN SMALL BUSINESS) (FAR 52.204-5) (MAY 1999)**, Add the following “NOTE” to the title to read:

NOTE: To be completed only by large business concerns submitting proposals under the full and open competition portion of this solicitation.

28. **Under SECTION K.9 – SMALL DISADVANTAGED BUSINESS STATUS (FAR 52.219-22) (OCT 1999)**, Add the following “NOTE” to the title to read:

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NOTE: To be completed only by small disadvantaged business concerns submitting proposals as a prime contractor under the full and open competition portion of this solicitation.

29. Under SECTION K.10 – NOTICE OF PRICE EVALUATION ADJUSTMENT FOR SMALL DISADVANTAGED BUSINESS CONCERNS (FAR 52.219-23) (JUN 2003),

Add the following “NOTE” to the title to read:

NOTE: To be completed only by small disadvantaged business concerns submitting proposals as a prime contractor under the full and open competition portion of this solicitation.

30. Under SECTION K.17 – REPRESENTATION OF COMPLIANCE WITH THE ELECTRONIC AND INFORMATION TECHNOLOGY ACCESSIBILITY STANDARDS (MAY 2001), Change subparagraph (b) to read:

(b) The Offeror represents by fully completing the Electronic & Information Technology Accessibility Standards Evaluation spreadsheet 9 (attachment located in *Section J-10* of this solicitation) that the products and services offered in response to this solicitation comply with the Electronic and Information Technology Accessibility Standards at 36 CFR 1194, unless stated otherwise within the spreadsheet.

31. Under SECTION K.23 – LIMITATIONS ON SUBCONTRACTING, Revise to add blank lines for small business firms to complete:

This is applicable only to the set-aside portion of TIPSS 3 and should only be completed by those companies proposing on the set-aside portions, (a) unless an SDB is proposing as a Prime under the Full and Open Competition portion and is claiming the Price Evaluation Adjustment; or (b) unless a HUBZone is proposing as a Prime under the Full and Open Competition portion and is claiming the Price Evaluation Preference. In that case, complete the certification as well.

In support of the performance requirements stated in FAR clause 52.219-14, Limitations on Subcontracting, the following information shall be provided in the space below. If not enough room has been provided below, please submit an attachment to Section K detailing the information required.

At least 50 percent of the cost of contract performance incurred for personnel shall be expended for Employees of (Insert Name of Offeror's Company or Firm)

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Employees of (Insert Name of Offeror's Company or Firm)

will provide the following services in fulfilling the contract requirements. List the services and estimated cost of performance incurred for personnel, and provide brief narrative description.

For supplies (other than procurement from a regular dealer in such supplies) add:

The (Insert Name of Offeror's Company or Firm)

shall perform work for at least 50 percent of the cost of manufacturing the supplies, not including the cost of materials.

Employees of (Insert Name of Offeror's Company or Firm)

will perform the following work in fulfilling the manufacturing requirements. List the items and estimated cost of manufacturing, not including materials, and provide brief narrative description.

32. ADD NEW SECTION K.24 – PROPOSAL SUBMISSION, Add as follows:

I represent that I am submitting a proposal for TIRNO-04-R-00017, for the Total Information Processing Support Services-3 (TIPSS-3) requirement as:

_____ an 8(a) prime under the 8(a) Competitive portion of the solicitation

_____ a HUBZone prime under the HUBZone Competitive portion of the solicitation

_____ a Service Disabled Veteran-Owned Small Business under the Service Disabled Veteran-Owned Competitive portion of the solicitation

_____ a Small Business under the Small Business Set-Aside portion of the solicitation

_____ a Small Business under the Full and Open Competition portion of the solicitation

_____ a Large Business under the Full and Open Competition portion of the solicitation

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33. Under SECTION L.5 - 52.237-10 IDENTIFICATION OF UNCOMPENSATED OVERTIME (OCT 1997), After the end of the provision add the following Note:

Note: Offerors without uncompensated overtime **MUST** provide a statement to that effect and provide it as part of their proposal.

34. Under SECTION L.8 - DTAR 1052.219-73 DEPARTMENT OF THE TREASURY MENTOR PROTÉGÉ PROGRAM (JAN 2000), Delete the note after the provision that reads: “**OFFERS SUBMISSIONS SHOULD BE INCLUDED IN VOLUME I**” and Add:

OFFERORS SUBMISSIONS OF ANY INFORMATION REQUESTED IN SECTIONS L.1 THROUGH L.8 SHOULD BE INCLUDED IN VOLUME 1 OF THEIR PROPOSAL

35. Under SECTION L.11 – REQUEST FOR PROPOSAL QUESTIONS AND COMMENTS, Change the last sentence in the third paragraph to read:

The file can then be downloaded in Microsoft Word '97 or later version format.

36. Under SECTION L.12 - FORMAT AND INSTRUCTIONS FOR PROPOSAL SUBMISSION, Change L.12 (c) to read as follows:

(c) File formats for proposal submission are as follows:

(1) Text files (including charts, diagrams, and the like): Microsoft Word '97 or later version or PDF files on a CD.

(2) Spreadsheet files: Microsoft Excel '97 or later version, or PDF files on a CD.

NOTE: “Pre-printed” materials such as company annual reports submitted with **Volume III, Cost/Price Proposal and Financial Information** need not be submitted in electronic format.

37. Under SECTION L.13 – PROPOSAL/AWARD RESTRICTIONS, Make the following changes: Replace the first paragraph only with the following two paragraphs (the existing second paragraph will now be the third paragraph):

a. First Paragraph:

Offerors competing under Full and Open may submit up to three (3) stand alone proposals; one (1) per task area. For pre-award purposes, **Large business offerors must submit a proposal under each task area proposing as either a prime or a subcontractor, but not both. For preaward purposes both large and small business offerors must submit a proposal under the ISS task area as a Prime. Prime large business offerors may then elect to compete under the SBS or SSS task areas as a prime or they may be a subcontractor to another prime, but not both.**

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Small business offerors are not subject to these restrictions and may submit an unlimited number of proposals as either a prime or the subcontractor under the full and open competition as long as they submit at least one proposal as a prime contractor in the ISS area.

b. Second Paragraph:

Small Business Offerors may submit proposals in any of the four Small Business Set-Aside areas (8(a), HUBZone, Service Disabled-Veteran Owned, or Small Business Firm) as well as the Full and Open competition area. Each submission shall contain a stand alone proposal for each task area. In addition, Small Business Offerors may submit a proposal within the Small Business Set-Aside competition that identifies a Large Business subcontractor. With regard to the Partial Small Business Set-Aside Competition there is no conflict if the Large Business subcontractor has submitted a proposal as a Prime or been identified as a subcontractor under the Full and Open competition in another task area.

38. Under SECTION L.14 – VOLUME I – TERMS AND CONDITIONS, Delete the last paragraph and insert a new third paragraph to read as follows:

The Offeror shall submit one (1) original and four (4) hard copies of Volume I. The Offeror shall also submit two (2) electronic copies of Volume I in Microsoft Word '97 and/or Excel '97 or later version formats, or a PDF file on a CD. The only exceptions are attachments to the proposal which may not be available in electronic format.

39. Under SECTION L.14.1 – EXCEPTIONS, DEVIATIONS AND CONDITIONAL ASSUMPTIONS, Add the following two sentences at the end of the paragraph:

The Government expects to award with negotiations, however the Government, reserves the right to award without negotiation.

40. Under SECTION L.14.4.1 - PRE-AWARD CMMI[®] VALIDATION, Delete “(CMMI[®])” and replace with “(CMMI-SW)” in the first paragraph. Delete “sm” after the word “Improvement” in the second paragraph. Add “sm” and “(ARC Class A)” after the word “SCAMPI” in the third paragraph.

41. Under SECTION L.14.4.2 - DATA SUBMISSION REQUIREMENTS, is hereby changed as follows:

a. Last bullet of last sentence that starts with ‘Offerors proposing under’ Change this sentence to be a new bullet.

b. Paragraph (1). Sentence reads “...Veteran-Owned and Small Business Set-Aside...” Replace “Set-Aside” with “Firm”

42. Under SECTION L.14.4.3 - CMMI LEVEL 2 VALIDATION, is changed as follows:

1. First paragraph, first sentence, delete "I" from "CMMI." Second paragraph, add "sm" and "(ARC Class A)" after the word "SCAMPI." First bullet, add "-SW" after "CMMI."
2. Second bullet, insert "the assessment" before the word "was."
3. Third bullet, insert "the assessment" before the word "was."
4. Fourth bullet, insert "the assessment" before the word "was" and change "CMMI Version V.1.1 (ARC) to "CMMI (ARC) Class A Version V.1.1."
5. Fifth bullet is actually **two sub-bullets underneath bullet # 4**, change fifth bullet to read as follows under bullet # 4.:
 - Examined at least 3 projects
 - Covered, in the aggregate, at least 20% of the technical workforce proposed for software development
6. Sixth bullet becomes the fifth bullet, insert "the assessment" before the word "used."
7. Seventh bullet becomes the sixth bullet, insert "the assessment" before the word "considered."
8. Eighth bullet becomes the seventh bullet
9. Ninth bullet becomes the eighth bullet, insert "the assessment" before the word "was"
10. Tenth bullet is actually **two sub-bullets underneath bullet # 8**, change tenth bullet to read as follows under bullet # 8.
 - all appraisal team members were SEI trained and certified in the Introduction to CMMI course and Intermediate Concepts of CMMI course.
 - at least one member of the appraisal team has completed and is licensed and certified by the SEI as a SCAMPI Lead Appraiser (certificates for appraisal team members is required including the SEI SCAMPI Lead Appraiser number:

43. Under SECTION L.14.4.4 - INSTRUCTIONS TO OFFERORS – SOFTWARE DEVELOPMENT PREREQUISITE (APR 2002), incorporate the following changes:

1. Change Item # 1 to read: "In accordance with IRSAP Clause 1052.239-9005, Software Development Prerequisite (APR 2002), the proposal shall include the following evidence of the Offeror's CMMI-SW Level;
2. In Item # a. change "SW-CMM" to "CMMI-SW" and change the word "which" to that."
3. In Item # b. change "SW-CMM" to "CMMI-SW Level."
4. In Item # d. delete current wording and replace with: "The Standard CMMI Appraisal Method for Process Improvement - SCAMPIsm (ARC Class A) report and briefing, if applicable:
5. Delete Item # e. in its entirety.
6. Change Item # f. to Item # e.
7. Change Item # g. to Item # f, and change the sentence to read: "Profiles of the projects included in the SCAMPI (ARC Class A)."

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8. Change Item # h. to Item # g, and change the sentence to read: "The name and organizational affiliation of the Lead Appraiser, the SEI authorized identification number of the Lead, and the telephone number of the SCAMPI Lead AppraiserSM, as applicable.

44. **Under SECTION L.14.5 - SUBCONTRACTING PLAN**, Pursuant to J.5 change the second sentence in the first paragraph to incorporate the following:

Refer to Attachment J.5, Department of the Treasury Small, HUBZone Small, Small Disadvantaged, Woman-Owned Small, Veteran-Owned Small Business, & Service Disabled-Veteran Owned Small Business Concerns Subcontracting Plan Outline.

45. **Under SECTION L.14.6 - SMALL BUSINESS UTILIZATION PARTICIPATION**, Add to read as follows:

The required forms shall be provided to the Government in Volume 1.

46. **ADD NEW SECTION L.14.7 - TREASURY MENTOR-PROTÉGÉ PROGRAM PARTICIPATION**, Add as follows:

L.14.7 TREASURY MENTOR-PROTÉGÉ PROGRAM PARTICIPATION

This section applies only to large businesses submitting offers under the Full and Open acquisition. This solicitation contains the DTAR Provision 1052.219-73, Department of the Treasury Mentor-Protégé Program and DTAR Clause 1052.219-75, Mentor Requirements and Evaluation. Large Business offerors under the Full and Open Acquisition will be evaluated on two criteria: (1) Does the offeror have an approved Mentor-Protégé Agreement with the Department of the Treasury for one or more small business firms. (2) Has the offeror recently added and received approval for a Mentor-Protégé Agreement with the Department of the Treasury for TIPSS 3 with a small business firm that is both new to the company and new to the IRS (no past performance with either company or agency). Each Large Business Offeror is required to submit documentation in the form of their approved Mentor-Protégé agreements with the Department of the Treasury to receive evaluation credit in Section M, in accordance with M.4.1. This information is to be provided in Volume I of their offer.

47. **Under SECTION L.15 – VOLUME II – TECHNICAL PROPOSAL**, Delete this section in its entirety and replace as follows:

The following paragraphs prescribe the format of Volume II and describe the approach to be used in the development and presentation of the proposed data. These instructions are designed to assure the submission of information essential to the understanding and comprehensive evaluation of each Offeror's proposal.

The Offeror shall submit one (1) original and four (4) hard copies of Volume II. The Offeror shall also submit two (2) electronic copies of Volume II in Microsoft Word '97 and/or Excel '97 or later version formats or PDF files on a CD.

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The only exceptions are attachments to the proposal which may not be available in electronic format.

*Large Business Offerors and Small Business Offerors who elect to compete under the Full and Open Competition **must** submit a proposal for the Information Systems Services (ISS) Principal Task Area **and may** submit a proposal for any or all of the two (2) other Principal Task Areas . Large Business Offerors and Small Business Offerors who **do not propose in the ISS Task Area will be determined to be non-responsive**. (See L.13 and M.4.1)*

Small Business Offerors who submit a proposal under the Partial Small Business Set-Aside Competition shall submit a proposal for any or all of the three (3) Principal Task Areas.

48. Under **SECTION L.15.1 - FORMAT**, Change "Section L" reference in first paragraph to read: "Section L.15.2."

49. Under **SECTION L.15.2 – CONTENT**, Delete in its entirety and replace to read:

Each Offeror shall submit their technical proposal in four (4) separate technical sections as listed below. Each section shall be able to stand on its own merit and be modular in nature. Page limitations, if any, exclude materials that do not contain information to be evaluated or assist evaluators in reviewing the proposal (e.g., table contents, glossary, etc.).

- **TECHNICAL SECTION A – PROJECT PROFILES**
- **TECHNICAL SECTION B – MANAGEMENT APPROACH**
- **TECHNICAL SECTION C – RESUMES**
- **TECHNICAL SECTION D – ORAL PRESENTATIONS**

Offerors are cautioned that in conducting its evaluation, the Government may use data provided by the Offeror in its proposal as well as data obtained from other sources. While the Government may elect to consider data obtained from other sources, the burden of providing thorough and complete information rests with the Offeror.

Page limitations, with exception to materials that do not contain information to be evaluated or assist evaluators, e.g., table contents, glossary, etc., are as follows:

TECHNICAL SECTION A – PROJECT PROFILES (See L.15.3)

Full and Open Competition - Per Principle Task Area;

Project Profiles - not to exceed 10 pages each, 5 profiles required = 50 pages maximum.

Maximum Per Principle Task Area = 50 pages.

Partial Small Business Set-Aside - Per Principle Task Area:

Project Profiles - not to exceed 10 pages each, 3 profiles required = 30 pages maximum.

Maximum Per Principle Task Area = 30 pages.

TECHNICAL SECTION B – MANAGEMENT APPROACH (See L.15.4)

Full and Open Competition

Management Approach - not to exceed 15 pages.

Maximum in proposal = 15 pages.

Partial Small Business Set-Aside

Management Approach - not to exceed 15 pages.

Maximum in proposal = 15 pages.

TECHNICAL SECTION C – RESUMES (See L.15.5)

Full and Open Competition

- Key Management (KM) Résumés - not to exceed 2 pages each,
4 résumés = 8 pages maximum.
- Back-up KM Résumés -not to exceed 2 pages each,
4 résumés = 8 pages maximum
Maximum in proposal = 16 pages.

Partial Small Business Set-Aside

- Key Management Résumés - not to exceed 2 pages each, no more 4 résumés = 8 pages maximum.
Maximum in proposal = 8 pages

TECHNICAL SECTION D – ORAL PRESENTATIONS (See L.15.6)

- All Offerors within the Competitive Range

50. Under **SECTION L.15.3 – TECHNICAL SECTION A – PROJECT PROFILES**, is hereby changed to read:

First paragraph, add the following sentence at the end: “All Offerors are required to provide the names and phone numbers of the Government Task Managers or Technical Points of Contact for each project profile submitted.

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Second paragraph, Change Section C” reference to “Section C.6. Principle Task Areas.

At the sentence that reads: “Considerations for relevancy will be:”, Revise the fifth bullet to read as follows:

Level of Effort >4000 hours and/or value of task >\$225,000 (SB)

Third paragraph, add the following sentence at the end: “All project profiles must contain information which is relevant to specific project or a specific task order.

51. Under SECTION L.15.5 - TECHNICAL SECTION C – RESUMES, Second paragraph, first sentence, change “Section H, KEY PERSONNEL” to “Section H, KEY MANAGEMENT PERSONNEL.

Make the following changes to the second and fourth paragraphs to read as:

a. Change the reference to “Section L.12.2” in the second paragraph to read “Section L.15.2”. Include and make a part of the second paragraph the following: “Offerors may submit the same key management personnel resumes within each proposal submission.

b. Change the reference to “Management Approach” (L.12.4)” in the fourth paragraph to read “Management Approach” (Section L.15.4).

52. Under SECTION L.15.6 - TECHNICAL SECTION D – ORAL PRESENTATIONS, Change the second sentence to read:

All those Offerors within the Competitive Range will receive instructions on the Oral Presentations from the Contracting Officer by e-mail. (See M.4.2).

53. Under SECTION L.16 - VOLUME III – COST/PRICE PROPOSAL AND FINANCIAL INFORMATION, Delete in its entirety and replace to read:

The Offeror shall submit one (1) original and four (4) hard copies of Volume III, Sections B.2 thru B.6 CPFF Services and Prices and T&M Hourly Rates, and a grand total summary sheet that totals the base year and all option years, in Microsoft Word '97 and/or Excel '97 or later version formats, or PDF file on a CD. All Electronic Excel files and worksheets should not be submitted locked or protected. The only exceptions are attachments to the proposal which may not be available in electronic format.

The Government reserves the right to verify/follow-up on any of the information presented in Volume III of the proposal. This volume of the proposal shall consist of the following for the Prime Contractor: Subcontractor costs must be clearly traceable in the Prime Contractor’s proposal.

54. Under **SECTION L.16.1 – COST/PRICE PROPOSAL**, Make the following changes:

a. Change the third sentence in the first paragraph to read:

Offerors shall submit a separate cost proposal for each of the Principle Task Areas proposed (for the Cost Plus Fixed Fee (CPFF) portion) and fully burdened fixed hourly rates for the Time & Material and Fixed Price Portions of Section B.

b. Delete paragraph three and add the following four paragraphs that read as follows:

For the CPFF portion of Section B, the Offeror shall clearly state their methodology for deriving labor category rates proposed in sufficient detail for the Government to determine cost realism. Supporting documentation should be submitted by the Offeror to explain the basis of these rates. This documentation should include the most detailed information currently available to the Offeror. To the greatest extent possible, the rates should be based upon current rates experienced rates, forward pricing rates and equivalent measures. These rates should not be based upon general market surveys, or equivalent measures. If forward pricing rates are utilized, documentation in support of labor rates from the Defense Contract Audit Agency (DCAA) or the Administrative Contracting Officer (ACO) may be requested by the government.

For the T&M Hourly Rate Support, the Offeror shall provide supporting information for the basis of its proposed T&M hourly rates. Supporting information may include such information as the following: 1) current or prior GSA schedules; (2) company price lists; (3) current invoice or sales information; (4) payroll information; (5) other current or prior Government contract information; (6) catalog prices; (7) market price information; (8) discount information; and (9) rate formula information. The Contracting Officer may require additional supporting information, but only to the extent necessary to determine whether the price(s) offered is fair and reasonable. Also, the data may include all direct costs, indirect costs, profit and any other factor that contributes to the proposed hourly rate.

Estimates contained in Section J.6, Labor Categories and Hours, should be for evaluation purposes only and should not be construed as limitations on types or quantities of labor that may be subsequently acquired under TIPSS-3 contracts. The hours are for proposal evaluation purposes only and do not commit the government. All prices/cost should be proposed based on work to be completed on Government sites.

An adequate accounting system is required in accordance with FAR 16.301-3. The Offeror should identify the status of its accounting system, billing system and purchase system as to the adequacy.

55. Under **SECTION L.17 - SMALL BUSINESS OFFERS**, Delete the fourth paragraph that starts with "EXAMPLE: If Offeror..."

56. Under **SECTION L.18 – ALTERNATE PROPOSALS**, this section is **deleted** in its entirety and **renamed SECTION L.18 MULTIPLE PROPOSALS** to read as follows:

L.18 MULTIPLE PROPOSALS

Large Business Offerors and Small Business Offerors who elect to compete under the Full and Open Competition must submit a proposal for the Information Systems Services (ISS) Principal Task Area and may submit additional separate proposals for any or all of the two (2) other Principal Task Areas.

Small Business Offerors who submit a proposal under the Partial Small Business Set-Aside Competition shall submit a proposal for any or all of the three (3) Principal Task Areas when submitting as 8(a), HUBZone, Service Disabled Veteran-Owned or Small Business Set-Aside firms.

57. Under **SECTION M.2 – GENERAL**, Delete the fifth paragraph in its entirety.

58. Under **SECTION M.3 – BASIS FOR AWARD**, Change the L.6 notation in the second sentence of the first paragraph to read L.9.

59. Under **SECTION M.4 – EVALUATION PROCEDURE**, Delete in its entirety and replace with the following:

Proposals shall be submitted in accordance with the instructions set forth in Section **L.12 FORMAT AND INSTRUCTIONS FOR PROPOSAL SUBMISSION**

Prior to the commencement of the evaluation of **VOLUME I** –Terms and conditions; **VOLUME II** –Technical Proposal and **VOLUME III** Cost/Price and Financial Data ; The Contracting Officer will review proposals submitted to determine compliance with L.12. Proposals must be in compliance to receive further consideration.

60. Under **SECTION M.4.1 – PROPOSAL PREPARATION COMPLIANCE DETERMINATION**, Delete and change to read as follows:

SECTION M.4.1 - VOLUME I TERMS AND CONDITIONS - COMPLIANCE DETERMINATION:

Volume I - Evaluation For Compliance

The following items will be evaluated for compliance:

- **REPRESENTATIONS, CERTIFICATION AND AGREEMENT WITH TERMS AND CONDITIONS** - The Offeror shall indicate its acceptance of all the requirements, terms and conditions of the solicitation. (See L.14.3)

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- IRS CAPABILITY MATURITY MODEL (CMMI) REQUIREMENTS - Offeror's proposal will be reviewed based on the receipt of the compliance letter for CMMI Level II. (See L.14.4)
- SUBCONTRACTING PLAN - Compliance Issue - All Large Business proposals will be evaluated based on the receipt of their Subcontracting Plan and SF295 Forms (See L.14.5)
- SMALL BUSINESS UTILIZATION PARTICIPATION - Compliance Issue- Offeror's proposals will be evaluated based on completion of information requested per the sample forms. (See L.14.6)

Volume I – Evaluation For Scoring

The following item will be evaluated and scored:

- TREASURY MENTOR-PROTGE PROGRAM PARTICIPATION - Evaluation Scoring Issue- Large Business Offerors under the Full and Open Acquisition will be evaluated and scored based on criteria referenced in Section L.14.7. These score/points will be added to the offerors total technical score, prior to the competitive range determination.

61. Under SECTION M.4.2 – TECHNICAL PROPOSAL EVALUATION, ORAL PRESENTATIONS, Make the following changes:

- a. Change the second sentence to read:

Instructions for Oral Presentations, along with Evaluation Factors for award, will be provided to all Offerors within the Competitive Range by the Contracting Officer via email (reference Section L.15.6, TECHNICAL SECTION D – ORAL PRESENTATIONS).

- b. Delete the third sentence.